

National Institutes of Health

Conference, Administrative, and Travel Services II Contract

NIHCATS II

Standard Operating Procedures

August 14, 2012



FOREWARD

The Standard Operating Procedures (SOP) herein contain guidelines for utilizing the National Institutes of Health (NIH) Conference, Administrative, and Travel Services II (NIHCATS II) contract vehicle to obtain a wide range of administrative, meeting, conference, and travel support services across the NIH and OPDIV's within HHS.

The NIHCATS II contract vehicle is structured as twenty (20) Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts, using task orders for acquisition of specified services. The task orders will be awarded under the Federal Acquisition Streamlining Act (FASA) which requires that the prime contractors be given a fair-opportunity-to-be-considered (FOC) for task order awards.

Please refer to the NIHCATS II Website (<http://NIHCATSII.olao.od.nih.gov>) and/or contact the NIHCATS II Program Support Team (NIHCATSII@mail.nih.gov) if you have any questions, need additional information, and/or require official documentation and administration related to task order establishment.

The NIHCATS II award mechanism will operate using the NIHCATS II electronic Government Ordering System (eGOS), when available and implemented. This SOP will be updated at that time to provide specific, streamlined guidance on how to use eGOS in placing a task order.

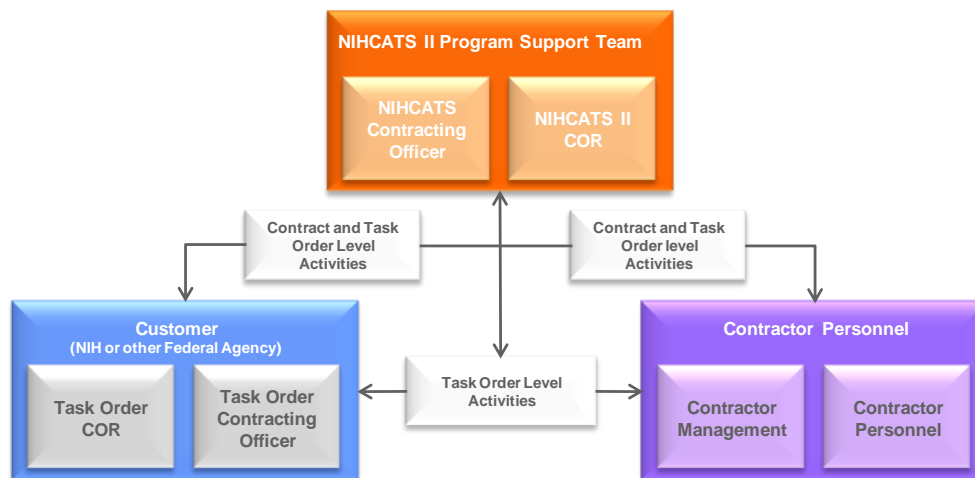
Task Order Guidelines are subject to change; please refer to the latest version in effect. The latest version will supersede all earlier versions.

ACRONYMS

The following is a list of acronyms used throughout this document.

<u>Abbreviation</u>	<u>Full Name</u>
CO	Contracting Officer
COAC	Consolidated Operations Acquisitions Centers
COR	Contracting Officer's Representative
eGOS	Electronic Government Ordering System
FAR	Federal Acquisitions Regulation (http://www.acquisition.gov/far)
FASA	Federal Acquisition Streamlining Act
FP	Fixed Price
IC	Institutes and Centers
ID/IQ	Indefinite Delivery/Indefinite Quantity
IGCE	Independent Government Cost Estimate
NIHCATS	NIH Conference, Administrative, and Travel Services
NIH	National Institutes of Health
OLAO	Office of Logistics and Acquisition Operations
SOW	Statement of Work
SRD	Selection Recommendation Document
T&M	Time & Materials
TO	Task Order
TORP	Task Order Request Package

NIHCATS II ORGANIZATIONAL CHART



Additional details of the roles and responsibilities shown in the diagram above are described in Section 2.

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1 GENERAL INFORMATION

The National Institutes of Health Conference, Administrative, and Travel Services II (NIHCATS II) contracts are support services contracts providing domestic and international travel, meetings and conference management, and administrative support services for the National Institutes of Health (NIH) and other Federal agencies. The objective is to provide all the necessary services, qualified personnel, and facilities, not otherwise provided by or available to the Government, as outlined in the Statement of Work. The NIHCATS II contracts are multiple award, non-mandatory indefinite delivery/indefinite quantity (ID/IQ) contracts using Task Orders which provide improved response time at equitable and reasonable prices to customers.

The geographic scope of these contracts includes the Continental United States and abroad. Contractors have the ability to operate and provide remote locations of personnel to 100 nations worldwide, and at times up to 20+ countries to include the African nations of Botswana, Cote d'Ivoire, Ethiopia, Kenya, Rwanda, South Africa, Tanzania, Uganda and Zambia; the Caribbean nations of Guyana and Haiti; and Vietnam, India, Cambodia and other nations abroad. This assignment to a remote location can range from a performance period of one month to one year or longer.

The NIHCATS II contracts period of performance consists of a base performance period plus four one-year option periods.

1.1 Non-Personal Services

Contractor employees performing services under this order will be controlled, directed and supervised at all times by management personnel of the contractor. Contractor employees will perform independent of and without the supervision of any Government official. Actions of contractor employees may not be interpreted or implemented in any manner that results in any contractor employee creating or modifying Federal policy, obligating the appropriated funds of the U.S. Government, overseeing the work of Federal employees, providing direct personal services to any Federal employee or otherwise violating the prohibitions set forth in Parts 7.5 and 37.1 of the Federal Acquisition Regulation (FAR). The Government will control access to Government facilities and will perform the inspection and acceptance of the completed work.

1.2 Labor Categories

Support under the NIHCATS II contracts includes the following management and support services labor categories.

A brief description of the various labor categories, including skill, education, and experience requirements, is provided below.

Labor Category	Description
Project Manager	Functional Responsibility: Manages multiple projects and project managers. Serves as the overall lead or director on complex projects and multiple agency

Labor Category	Description
	<p>contracts and serves as the principal liaison between the contractor and multiple government agencies. The Project Manager is responsible for ensuring that all tasking associated with a Government-funded program or project is completed effectively and efficiently, on time. Manages associated technical project issues. Assures quality control programs are in place and consistent on all programs assigned.</p> <p>Education: MA/MS desired; BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>
Assistant Project Manager	<p>Functional Responsibility: Serves as a lead on complex projects and multiple agency contracts and serves as the principal liaison between the contractor and multiple government agencies. The Assistant Project Manager is responsible for ensuring that all tasking associated with a Government-funded program or project is completed effectively, efficiently, and on time. Coordinates manpower and resources for multiple projects. Manages associated technical project issues. Assures quality control programs are in place and consistent on all programs assigned.</p> <p>Education: MA/MS desired; BA/BS required</p> <p>Experience: 8 or more years relevant experience</p>
Administrative Assistant	<p>Functional Responsibility: In direct support of professional positions, conducts a variety of clerical and administrative activities. Maintains office files. Provides word processing, spreadsheets and graphics as desired; other duties as assigned.</p> <p>Education: High school degree</p> <p>Experience: 2 or more years relevant experience</p>
Web Project Manager	<p>Functional Responsibility: Responsible for web strategy and operations. Develops business plan and annual budget for website function. Accountable for budget, staff planning, management, and products and service delivery. Oversees operational activities of the website(s) with specific attention aimed at content creation and website maintenance.</p> <p>Education: BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>

Labor Category	Description
Web Designer	<p>Functional Responsibility: Under general supervision, designs and develops user interface features, site animation, and special-effects elements. Contributes to the design group's efforts to enhance the look and feel of the organization's online offerings. Designs the website to support the organization's strategies and goals relative to external communications. Develops applications based on current, new and future net-based applications. Requires significant graphics and design experience as well as HTML knowledge.</p> <p>Education: BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>
Web Software Developer	<p>Functional Responsibility: Experienced in the design and development, testing, deployment, and maintenance of web or web applications constructed in a business application or survey application mode. Experienced in developing 508-compliant web applications for relational database and/or data retrieval systems.</p> <p>Education: BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>
Web Content Administrator	<p>Functional Responsibility: Responsible for developing and providing content that will motivate and entertain users so that they regularly access the website and utilize it as a major source for information and decision-making. Responsible for managing/performing website editorial activities including gathering and researching information that enhances the value of the site. Locates, negotiates, and pursues content. Seeks out customers to gather feedback for website improvement and enhancements. Requires experience in production management, web page design, HTML, and web graphics types and standards.</p> <p>Education: BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>
Interpreter	<p>Functional Responsibility: Possess skills in a broad range of general interpreting assignments. Are used in general assignments, including, but not limited to, staff/business meetings, interviews, training courses, conferences and education classes.</p>

Labor Category	Description
	<p>Education: A minimum of an Associates Degree in relevant area. An additional two years of experience in the relevant area may be substituted for an Associates Degree.</p> <p>Experience: 3 or more years in interpreting services. Interpreters must have demonstrated proficiency in grammar and spelling</p>
Escort	<p>Functional Responsibility: Meets a foreign visitor upon arrival at the port of entry. Assists with customs, immigration concerns, travel logistics and other duties.</p>
Statistician	<p>Functional Responsibility: Collects, classifies and analyzes quantified and statistical data in projects and special studies. Develops study plans, determines data needs and statistical techniques to be applied, and prepares reports and studies.</p> <p>Education: Master's degree in Finance or related field</p> <p>Experience: 8 or more years relevant experience</p>
Evaluation Specialist	<p>Functional Responsibility: Supports evaluation efforts through extensive information gathering, report generation, and data analysis.</p> <p>Education: BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>
Audio/Visual Coordinator	<p>Functional Responsibility: Provides videoconferencing services for various groups. Receives requests for videoconferencing services, schedules events with videoconferencing coordinators, works with requesters concerning meeting requirements, sets up and tests equipment including peripherals, trains users as necessary, handles controls or peripheral equipment for high-profile meetings, breaks down and stores equipment between uses, and provides audiovisual assistance as requested. Uses computer equipment and software for e-mail, videoconferencing scheduling, word processing, spreadsheets, databases, and/or Internet access. Attends videoconferencing facilitator meetings and annual refresher seminars. May perform work in video-related areas such as videotaping, photography, equipment maintenance, database updates, or equipment research.</p>

Labor Category	Description
	<p>Education: High school degree</p> <p>Experience: 2 or more years relevant experience</p>
<p>Logistical/Technical Support Specialist</p>	<p>Functional Responsibility: Performs logistical tasks associated with logistics engineering, scientific or general data processing functions within Governmental and/or civil development. Acquisition, sustainment and/or operational environments, interfaces with individual users to resolve operational and/or business processes, and/or routine technical problems. Coordinates tasks with other employees, trains and assists less-experienced personnel. Participates as an individual contributor and as a member of multiple cross-functional integrated product teams and/or functional area teams.</p> <p>Education: BA/BS required</p> <p>Experience: 3 or more years relevant experience</p>
<p>Conference Management Director</p>	<p>Functional Responsibility: Provides oversight on conference management projects. Serves as a lead on complex projects and multiple agency contracts and serves as the principal liaison between the contractor(s) and multiple government agencies. The Conference Management Director is responsible for ensuring that all tasking associated with a Government funded program or project is completed effectively and efficiently, on time and within budget. Coordinates manpower and resources for conference projects. Assures quality control programs are in place and consistent on all projects assigned.</p> <p>Education: BA/BS required</p> <p>Experience: 7 or more years relevant experience</p>
<p>Graphic Artist</p>	<p>Functional Responsibility: Prepares art and graphic design/illustration projects. Conceptualizes designs and produces trade show booths and/or other types of exhibits and their accompanying materials. Designs graphic materials for project presentations.</p> <p>Education: Associates or formal training in Graphic Design or acknowledged mastery and recognition as a professional artist.</p> <p>Experience: 5 or more years relevant experience</p>

1.3 Contract and Task Order Management

Contract and task order management is a mandatory element for all task orders placed under the NIHCATS II contract vehicle. The objective of contract management is to provide the program management, project control, and contract administration support needed to manage a high volume, multiple contract task order process.

The application of processes that support task order management are encouraged to ensure that cost, schedule, and quality requirements of each task order are tracked, communicated to the government, and ultimately attained.

1.4 Task Areas

The following categories cover the total scope of services for the NIHCATS II contracts:

1. Travel Support
2. Meeting and Conference Support
3. Documentation Support
4. Administrative Support
5. Website Design, Development, and Maintenance Support

1.4.1 Travel Support (Task Area 1)

Task Area 1 provides travel support in support of the following tasks:

- coordinate travel arrangements (domestic and international) for program participants,
- provide escort services,
- support the translation and preparation of program documents,
- handle lodging accommodations, and
- provide varied assistance at workshops and conferences (subsistence allowances for participants).

The Contractors operate and provide services in remote locations for personnel in upwards of 100 nations worldwide, and at times up to 20+ countries to include the African nations of Botswana, Cote d'Ivoire, Ethiopia, Kenya, and Haiti; and Vietnam, India and other nations abroad.

A non-exhaustive list of examples of the type of work to be performed under this task area includes:

Travel Support (Task Area 1)

- Coordinate and manage travel arrangements
- Develop detailed travel itineraries, both domestic and international
- Investigate and report on a variety of transportation options specified to the needs of the program
- Provide guidance and assistance to U.S. foreign travelers (e.g., obtaining passports and/or visas)
- Purchase economy class (or business or first class if specified in writing by the Task Order Contracting Officer (CO)) air fare or other tickets for domestic or international travel

(Note: The purchase of other than economy fares is restricted unless authorized by the IC Director or higher level authority through a written justification to ensure compliance with Federal Regulations. Use of Foreign Flag and Premium class is restricted to one-way travel lasting more than 14 hours or medical approved excuse. Contractors must comply with U.S. flag carrier regulations and requirements.)

- Purchase and arrange ground transportation as required (taxi cabs, shuttle service, limousine service, and rental car) as requested
- Arrange hotel or other lodging accommodations, both domestic and international

(Note: In the instance a visitor will remain in the U.S. for an extended period of time, the contractor shall recommend and/or obtain suitable lodging in the form of a furnished house, apartment, university housing, etc. taking into account convenience of location in terms of commuting, safety, and cost effectiveness. In most instances, the contractor shall pay lodging costs directly to the hotel or lesser in advance or as identified by the Task Order CO. Late arrivals must be guaranteed.)

- Pay appropriate allowance (e.g., per diem, hotel) in advance as specified by the task order statement of work as authorized in writing by the Task Order CO.

(Note: The contractor shall be responsible for reporting any payments made to travelers to the IRS. This reporting may be required and/or modified by the IRS code and international treaties and agreements.)

- Make direct contact with the host and/or traveler to ensure that all arrangements are mutually understood concerning arrival times, accommodations, addresses, official functions, financial arrangements, special events, and any other specifications

(Note: All such arrangements must be approved and confirmed by the Task Order Contracting Officer's Representative (COR))

- Provide the host/traveler and Task Order COR with a detailed and typed itinerary listing

dates and times, addresses, contact information, and accommodations for the following specifications:

- Appointment(s)
 - Escort(s) and program coordinator(s)
 - Transportation arrangements, schedules, etc.
 - Invitations
 - Conference orientation plans
 - General travel tips
 - Emergency points of contact for all participants and attendees
- Provide reimbursement upon receipt of expense statements for:
 - Charges for storing baggage and equipment in baggage rooms or terminal lockers if deemed necessary for official business only during the period of performance of the task order
 - Charges for telegrams, cablegrams, and local and long-distance telephone calls concerning official business only
 - Passport and visa fees and associated costs (e.g., passport and visa photographs, affidavits, required inoculations, etc.)
 - Fees for entry into foreign countries (e.g., port taxes) and all other allowable travel costs and expenses incurred as authorized by Federal Government Travel Regulations, Policies, and Procedures

(Note: Written instructions for expense statements shall be prepared by the contractor and provided to the traveler and Task Order COR.)

- Supply highly skilled interpreters who can provide simultaneous foreign language interpretation at scientific meetings and conferences.

(Note: Due to the complexity and high level security for other Federal agencies, special provisions will be made at the task order level with each contractor, the Government, and other HHS OPDIV's. When an interpreter has been assigned to a delegation, he/she will also act as an escort during the entire duration and will require travel arrangements, per diem, and lodging at the same level and rate as the foreign visitors.)

Travel to a remote location may be required at short notice. The contractor shall be responsible for making these arrangements.)

- Provide a limousine or other ground transportation (taxi, bus, rental car, etc.) as required
- Provide rapid response to changes in programs and unanticipated events. For example, response time may be less than one hour's notice for a transportation need
- When required under the task order, an escort shall meet a foreign visitor upon arrival at the port of entry. Services provided by the escort shall include, but are not limited to, the following:
 - Assist with customs, immigration concerns, and luggage
 - Assist with connecting flight logistics, if the visitor is not staying in the city of entry
 - Accompany the visitor to the hotel and assist with check-in procedures. Alert hotel staff regarding any special accommodations
 - Assist in check cashing procedures and all financial matters
 - Explain all subsistence procedures
 - Review itinerary with the visitor and determine if there are any concerns or problems requiring immediate attention. Notify the Task Order COR and resolve problems to the extent possible in an expeditious manner or within a specified timeframe
 - Provide the visitor with an orientation of the surroundings, including personal care requirements (e.g., concierge services, special accommodations), area restaurants, and public transportation options
 - Provide a brief orientation regarding American culture (i.e., customs, colloquialisms, and trends)
 - Be available at all times during a visitor's stay to accompany him/her to meetings, conferences, and appointments
 - Progressively provide and brief the visitor on all itinerary and visit changes
 - Confirm return air reservations with airlines and traveler
 - Assist with check-out procedures prior to departure, verify that all hotel charges accurately reflect costs incurred during the stay, and ensure that the hotel bill has been paid in accordance with the hotel contract
 - Provide services of foreign-speaking escort/translator and accommodations as required by the task order

For additional information regarding the type of work included under Travel Support (Task Area 1), please refer to the Statement of Work.

1.4.2 Meeting and Conference Support (Task Area 2)

Task Area 2 provides logistical support for conferences, meetings, seminars, and workshops held in the United States and in foreign countries as well as support for the writing and production of reports/documents, and the distribution of conference materials.

A non-exhaustive list of examples of the type of work to be performed under this task area includes:

Meeting and Conference Support (Task Area 2)

- Demonstrate ability to analyze and endorse conference center agreements, hotel contracts, etc.
- Secure other contractor support as needed (with prior written Task Order CO approval)
- Design and develop meeting website, graphics, etc.
- Design registration and abstract submission forms
- Facilitate online abstract review process
- Provide on-site coordination and logistical and technical support
- Prepare post-conference summary
- Prepare and deliver weekly status reports on progress, budget, etc.
- Provide technical and logistical meeting support for presentations and registration on-site
- Perform Internet searches to adequately secure housing for conference participants as needed
- Provide meeting rooms, audiovisual equipment, supplies, and services incidental to conference conduct
- Manage oversight for invitations, registration, pre-conference distributions, and associated fees
- Provide and manage online registrations granting worldwide access and meeting arrangement capacity
- Establish message centers
- Provide evaluation and statistical analysis support (i.e. provide an array of technical services in support of government research and educational issues)

- Provide personnel to facilitate planning and implementing actions/changes throughout the decision-making and conference implementation process.

(Note: All personnel have knowledge of the Federal Government's rules and regulations on travel)

- Record and transcribe proceedings
- Provide and operate audiovisual equipment
- Provide simultaneous foreign language interpreters as required with an immediate response time
- Management, coordination and implementation of collection of third party payments*
- Liaison support with venue*

Note: The contractor shall pay all upfront charges (e.g., the contractor will be responsible for funding the reservation of conference space, and/or hotel accommodations after the required approvals have been obtained.)

This task area prohibits and restricts the use of any meals for Federal Government employees (See effective Efficient Spending Policy (<http://oamp.od.nih.gov/ContractToolBox/SpendingPolicy.asp>)

For the asterisked (*) item of this Task Area, collection of third party payments can only be performed in accordance with the Task Order IC/Agency current policies, procedures and authority. All IC/Agency approvals must be obtained prior to the collection of third party payments.

The Task Order COR is responsible for obtaining a financial report between the contractor and recipient for all upfront charges. This report is to be provided to the Task Order Contracting Officer within **thirty** (30) days of each transaction. The report will be reviewed and filed in the task order file for audit and review purposes. The financial report must include documentation that was forwarded to the IC, higher level officials or Agency Director for approval for the upfront charges. This documentation must be divided into four parts, 1) Issue, 2) Discussion, 3) Recommendation, and 4) Decision. The individual agency's task orders will have to provide additional information on responsibility for payment. The report must include the recipient's name, date received, funding distribution copy, invoice date and number and the amount of the task order.

The contractor is required to pay for all appropriate services in a timely manner in accordance with the Task Order Request issued.

Definitions:

HHS "local travel area" - When a temporary duty site is outside of the "official duty station" area (see below), but within the vicinity surrounding it; and the site is a minimum driving distance of less than 50

miles, by the most direct route, from the employee's office/permanent duty station, the site is considered to be a part of the "local travel area".

"Official duty station" – The corporate limits of the city or town in which the employee's office/permanent duty station is situated.

(See NIH Manual Issuance 1500-06-01 - Per Diem Allowances in the Local Travel Area)

For additional information regarding the type of work included under Meeting and Conference Support (Task Area 2), please refer to the Statement of Work.

1.4.3 Documentation Support (Task Area 3)

Task Area 3 provides documentation services in support of meetings, conferences, seminars, and workshops held in the United States and in foreign countries.

A non-exhaustive list of examples of the type of work to be performed under this task area includes:

Documentation Support (Task Area 3)
<ul style="list-style-type: none"> • Prepare materials for distribution prior to the conference including briefing materials, spreadsheets, PowerPoint slides, preliminary agenda, travel and hotel data, and instructions concerning financial arrangements (e.g., hotel and travel accommodations) • Prepare materials for distribution at the conference including the final agenda, list of participants, notices of special functions, name badges, reference materials, and program booklets • Assist with preparation of program documentation ranging from simple agendas, progress reports, summary reports of meetings to bilingual briefing books containing proceedings of working meetings and background biographical data on program • Provide services including typing, collating, editing, reproduction, delivery, and mailings • Assist with preparation of abstract papers and/or publication of proceedings • Arrange for translation of documents as well as support the verification of accuracy and equivalency in translation. <p><u>(Note: Translators should have been included in the task order statement of work)"</u></p>

For additional information regarding the type of work included under Documentation Support (Task Area 3), please refer to the Statement of Work.

1.4.4 Administrative Support (Task Area 4)

The objective of the administrative support Task Area 4 is to provide services in direct support of conferences or scientific meetings. This contract cannot be used for temporary services or any other

administrative- associated support services."A non-exhaustive list of examples of the type of work to be performed under this task area includes:

Administrative Support (Task Area 4)

- Coordinate and manage general administrative tasks as identified in the SOW and in compliance with the contract
- (Note: Ongoing temporary services or acting as an office assistant is not covered under the NIHCATS II contracts.)
- Provide administrative support for conferences, workshops, symposiums, focus groups, and meetings
- Edit and publish newsletters, brochures, and pamphlets
- Develop graphics for newsletters, invitations, brochures, pamphlets for research, meetings, conferences, etc.
- Assist with the distribution of letters, documents, or other materials by e-mail, fax, postal service, or courier service

For additional information regarding the type of work included under Administrative Support (Task Area 4), please refer to the Statement of Work.

1.4.5 Website Design, Development, and Maintenance / Internet Support (Task Area 5)

Task Area 5 provides Internet and Intranet support, to include initial website design, development, and management, as well as to conduct usability testing to evaluate effectiveness and ease of use. This task area shall only be used in support of a conference, meeting, focus groups, scientific research, studies, etc.

A non-exhaustive list of examples of the type of work to be performed under this task area includes:

Website Design, Development, and Maintenance Support/Internet Support (Task Area 5)

- Design, develop, and maintain websites on the Internet, as required
- Present a professional online image that uses state-of-the-art features of web technology
- Design and develop newsletters, brochures, manuscripts, publications, and pamphlets, as required

(Note: Contractors will use existing graphics produced by NIH and other Federal agencies

whenever possible.)

- Meet with the Task Order COR and other appropriate staff of NIH and other Federal Agencies within one week of the effective date of each task order award to discuss the design process
- Work with the Task Order COR/CO and other Federal agencies to identify and comply with any IT security requirements regarding site content, concept, goals, violations, target audience outreach, and ideas for conference and meeting presentations
- Support text and graphic design/conversion for conferences and meetings
- Write or edit new documents for inclusion on NIH and Federal agency websites (use existing documentation when possible). All new documents shall be edited and proofread by the editorial staff to ensure the highest quality control
- Create new art (integrated into sites using hypertext markup language (HTML)), record and digitize audio, and program and integrate databases for website design
- Coordinate with the Website Manager/Task Order COR to manage database design, as well as provide technical support for site maintenance and tracking including but not limited to: validation of HTML and links, site testing on frequently used browsers and various platforms, publicity of site through search engines and metatags, and tracking of site usage and accessibility with daily user statistics and online surveys
- Convert images, audio, or video as requested for services requiring databases.

(Note: The contractors shall use current databases, JAVA and CGI scripts, and templates or cascading style sheets to create or re-design web pages. The contractor shall keep the website design up-to-date and apply new technologies (such as Portable Network Graphics (PNG), dynamic HTML, and Extensive Markup Language (XML)) when available to all browsers.)

For additional information regarding the type of work included under Website Design, Development, and Maintenance / Internet Support (Task Area 5), please refer to the Statement of Work.

1.4.6 Additional Notes

- Individual task orders require frequent close communication and interaction between the contractor and the Task Order COR. To insure that required services, face-to-face meetings, and daily document transfer are possible on a practical and cost-effective basis for the contractor to demonstrate how the necessary interactions can be successfully accomplished. The task order statement of work should clearly outline these requirements.
- Individual task orders may require a specified level of close and continuous communication. Task orders may require a specific Project Manager for the period of performance who will

serve as the principal point of contact with the Government and shall be the individual held responsible for production and oversight of all reports and plans, direct supervision and coordination of project staff and consultants, issuance of work assignments, monitoring the progress of this contract and provision of deliverables, and maintaining cost control.

- Individual task orders may require plans to ensure that no confidential or proprietary information recorded via notes, tapes or transcript during the conduct of a closed meeting or closed meeting session will be kept in files open to the public nor shall be accessible to anyone but those contracted employees directly engaged in the project. These plans shall include the disposition of finalized hardcopy and/or computer discs and thumb drives containing finalized summaries, minutes, reports, etc. that will ensure confidentiality and protection of the confidential information from unauthorized disclosure. For specific meetings where the contractor will have access to confidential information, the contractor may be required to sign a confidentiality/non-disclosure agreement prior to the meeting or prior to accessing to confidential documents. A similar confidentiality/non-disclosure agreement also will be signed by the Government attendees.
- Materials produced by the contractor shall not exceed the limitations imposed by the "Government Printing and Binding Regulations" published by the Joint Committee on Printing, Congress of the United States. The limitation is 5,000 reproductions of any page; documents consisting of multiple pages may not exceed an aggregate of 25,000 production units. In cases where quantities exceed this limitation, all customers will provide the contractor with the required materials for distribution. Individual task orders should identify all printing requirements along with any reporting requirements or restrictions on printing.
- Deliverables will be specified with each individual task order.

1.5 Task Orders

Task orders will be used to define and obtain services under the NIHCATS II contracts. Each task order is expected to have differing requirements based on the unique needs of the customer. Task orders may be either Fixed Price (FP) and/or Time & Materials (T&M). Though Fixed Price type task orders are preferred, Time & Materials are permitted but require a signed Determinations and Findings (D&F) in accordance with FAR 16.6 and any agency procedures. T&M should only be used if Fixed Price is not suitable.

1.6 Classified Material

A TORP will contain only unclassified material, regardless of the level of classification of the work to be performed under the task order.

The Task Order Contracting Officer and Task Order Contracting Officer's Representative are responsible for ensuring that proprietary information contained in the contractors' task order proposals is protected

Fixed Price Contracts

The President's Memorandum of March 4, 2009, on "Government Contracting" established a preference for fixed-price contracts. Fixed-price contracts (FAR Subpart 16.2):

- provide maximum incentive for the contractor to control costs and perform effectively
- impose a minimum burden upon the contracting parties
- expose the government to the least risk
- accommodate market fluctuations or other contingencies, when appropriate, using economic price adjustments

from unauthorized disclosure. It is the contractors' responsibility to ensure that all proprietary information is appropriately marked.

1.7 Supporting Documentation Submission

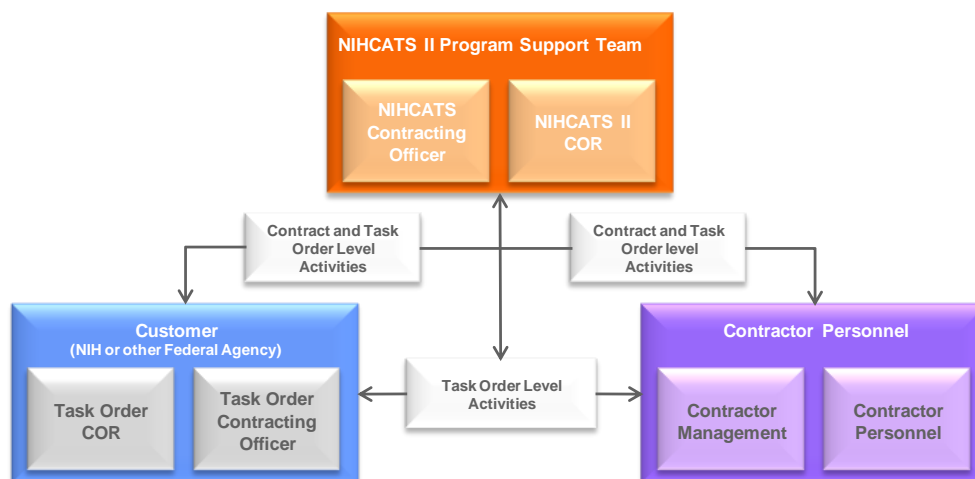
The required channel for delivery of all correspondence to the NIHCATS II Contracting Officer is electronic via e-mail (NIHCATSII@mail.nih.gov). Microsoft Word is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel.

2 ROLES AND RESPONSIBILITIES

The primary roles supporting the NIHCATS II contracts and task orders on behalf of the NIH and other Federal agencies are:

- NIHCATS II Program Support Team
 - NIHCATS II Contracting Officer (CO)
 - NIHCATS II Contracting Officer's Representative (COR)
- Customer (NIH / other Federal agency)
 - Task Order Contracting Officer (CO)
 - Task Order Contracting Officer's Representative (COR)

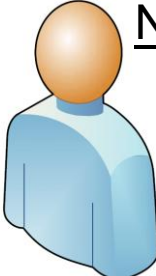
Specific representatives involved will play a significant role in the maintenance of the NIHCATS II contracts as well as the initiation, award, administration, tracking, and close-out of each task order. Responsibilities are outlined in the following sections and again later in the task order procedures.



2.1 NIHCATS II Program Support Team

The Office of Logistics and Acquisition Operations (OLAO) has established the NIHCATS II Program Support Team to provide contract-level **management and oversight for the NIHCATS II contract vehicle**. The NIHCATS II COR within OLAO has been designated to oversee and manage the contracts with support from the NIHCATS II CO. While individual task orders will include guidelines specific to the performance of the requirements of that task order, the overall contractual relationship between customers and contractors is maintained by the NIHCATS II Program Support Team.

2.1.1 NIHCATS II Contracting Officer




NIHCATS II Contracting Officer (CO)

Role: OLAO representatives who can negotiate changes to the Statement of Work (SOW), delivery schedule, and Period of Performance for the NIHCATS II contracts. Act as the Point of Contact (POC) for contractual issues.

Primary Responsibilities:

- Review and approve TORPs submitted by customers
- Release approved TORPs to vendors
- Coordinate and liaison between vendors and customers
- Announce task orders awards



NIHCATS II
CO

The NIHCATS II CO has the authority to act as an agent of the Government under the NIHCATS II contracts. Only the NIHCATS II CO has authority to:


- Serves as the primary point of contact for the NIHCATS II contracts
- direct or negotiate any changes in the Statement of Work or specifications of the **NIHCATS II contracts**;
- modify or extend the period of performance;
- change the delivery schedule;
- otherwise change any terms and conditions of the contracts;
- concur with any exceptions to the fair opportunity process; and
- perform contract administration duties such as exercising option years and contract close-out functions.

Other responsibilities of the NIHCATS II CO include, but are not limited to:

- reviewing TORPs and releasing TORPs to all contractors;
- serves as the primary point of contact for contractual issues related to the NIHCATS II contracts;
- concurring on Selection Recommendation Documents (SRDs); and

- announcing task orders awards.

2.1.2 NIHCATS II Contracting Officer's Representative (COR)



NIHCATS II Contracting Officer's Representative (COR)

Role: Support the NIHCATS II Contracting Officer by monitoring the technical progress of the contractors and assisting in the resolution of technical problems.

Primary Responsibilities:

- Log and maintain task order records
- Track and guide contract performance over the life of the NIHCATS II contracts

**NIHCATS II
COR**

The NIHCATS II COR within OLAO shall act as the NIHCATS II Contracting Officer's Representative for the purpose of the NIHCATS II contract vehicle. The NIHCATS II COR is responsible for:

- monitoring the contractor's technical progress, including the surveillance and assessment of performance;
- recommending changes in requirements to the NIHCATS II CO;
- interpreting the Statement of Work and any other technical performance requirements;
- performing technical evaluations as required;
- performing technical inspections and acceptance required by this contract; and
- assisting in the resolution of technical problems encountered during performance.

Other responsibilities of the NIHCATS II COR include, but are not limited to:

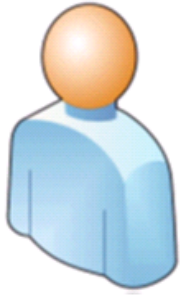
- logging and maintaining records of all task orders;
- conducting annual In-Progress Reviews (IPR) for each task order; and
- tracking and guiding contract performance over the life of the NIHCATS II contract vehicle.

2.2 Customer (NIH/other Federal agency)

Task orders will be used to define and obtain services under the NIHCATS II contract vehicle. Each task order is expected to have differing requirements based on the unique needs of the customer. The roles listed below describe those who will be responsible for the **procurement and oversight of task orders**. Individuals in these roles are considered to be "customers" of the NIHCATS II contract vehicle.

2.2.1 Task Order Contracting Officer (CO)

The Task Order Contracting Officer (CO) will have the authority to act as an agent of the Government under a particular task order. For NIH customers, the Task Order CO would be a warranted CO from their respective Consolidated Operations and Acquisitions Center (COAC) or, when applicable, from their ordering office. For customers at Federal agencies outside of NIH, the Task Order CO would be a warranted CO from their respective procurement office.



Task Order Contracting Officer (CO)

Role: The Task Order CO will have the authority to act as an agent of the Government under a particular task order and have the right to negotiate changes to the Statement of Work. The Task Order CO will support the Task Order COR through the task order process.

Primary Responsibilities:

- Submit TORP to NIHCATS II CO and COR
- Assist in the task order proposal evaluation
- Monitor and assess task order performance
- Responsible for all pre-award, award, administration, and close-out activities

Task Order Contracting Officer

The Task Order CO has authority to:

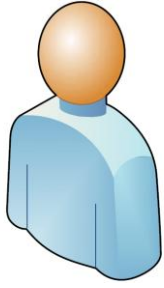
- direct or negotiate any changes in the Statement of Work or specifications of a task order;
- modify or extend the period of performance of the task order; as long as the period of performance of the task order does not exceed the period of performance of NIHCATS II contract;
- change the delivery schedule;
- otherwise change any terms and conditions of a particular task order; and
- obtain approvals for exceptions to the fair opportunity process.

Additional responsibilities of the Task Order CO include:

- responsible for all pre-award, award, administration, and closeout of an individual task order;
- submitting the TORP to the NIHCATS II CO and COR;
- executing the determination and findings (D&F) per FAR 16.602 for each task order awarded on a time and materials (T&M) basis;
- overseeing the Task Order COR evaluation of proposals;
- approving the Selection Recommendation Document (SRD);
- processing and awarding a task order;
- processing and awarding modifications to the task order;
- monitoring and assessing the contractor's task order performance;
- approving of final deliverables and/or statement that the work has been completed in accordance with the task order statement of work; and
- performing close-out tasks.

2.2.2 Task Order Contracting Officer's Representative (COR)

When the determination is made that a need exists for conference, administrative, or travel services, a Task Order Contracting Officer's Representative (COR) will first be identified. The Task Order COR must be FAC-COR certified and is responsible for all technical aspects of the task order. The Task Order COR will typically be the individual requiring the services offered under the NIHCATS II contract vehicle, or may be a designee within the IC or Federal agency requiring the service. The Task Order COR will represent the Government as the main interface between the program office and the contractor during the delivery of services.



**Task Order
COR**

Task Order Contracting Officer's Representative (COR)

Role: The individual requiring NIHCATS II contract services and represents the Government as the main interface between the program office and the contractor during the delivery of services.

Primary Responsibilities:

- Develop TORP
- Monitor the contractor's task order progress
- Interface with contractor management staff
- Complete contractor performance evaluation

The Task Order COR is responsible for:

- monitoring the contractor's technical progress on a task order;
- interpreting the Statement of Work (SOW) and any other technical performance requirements of a task order;
- providing direction to the contractor's management staff to facilitate task order performance;
- performing technical inspections and acceptance required by a task order;
- monitoring performance during the period of performance of the task order;
- assisting in the resolution of technical problems encountered during performance; and
- completing final contractor performance evaluations

Other responsibilities of the Task Order COR include, but are not limited to:

- developing the TORP;
- evaluating the technical and business proposals;
- preparing the Selection Recommendation Document (SRD) for Task Order CO approval;
- acceptance of final deliverables and/or statement that the work has been completed in accordance with the task order statement of work; and
- performing the Close-out tasks.

3 TASK ORDER GUIDELINES

Task orders are issued to procure services under the NIHCATS II contract vehicle. This section describes the details of the task order creation, solicitation, award, administration, and closeout. Additional steps and/or actions may be needed for non-NIH customers and are highlighted in the process.

The NIHCATS II award mechanism will operate using the NIHCATS II electronic Government Ordering System (eGOS), when available and implemented. This SOP will be updated at that time to provide specific, streamlined guidance on how to use eGOS in placing a task order.

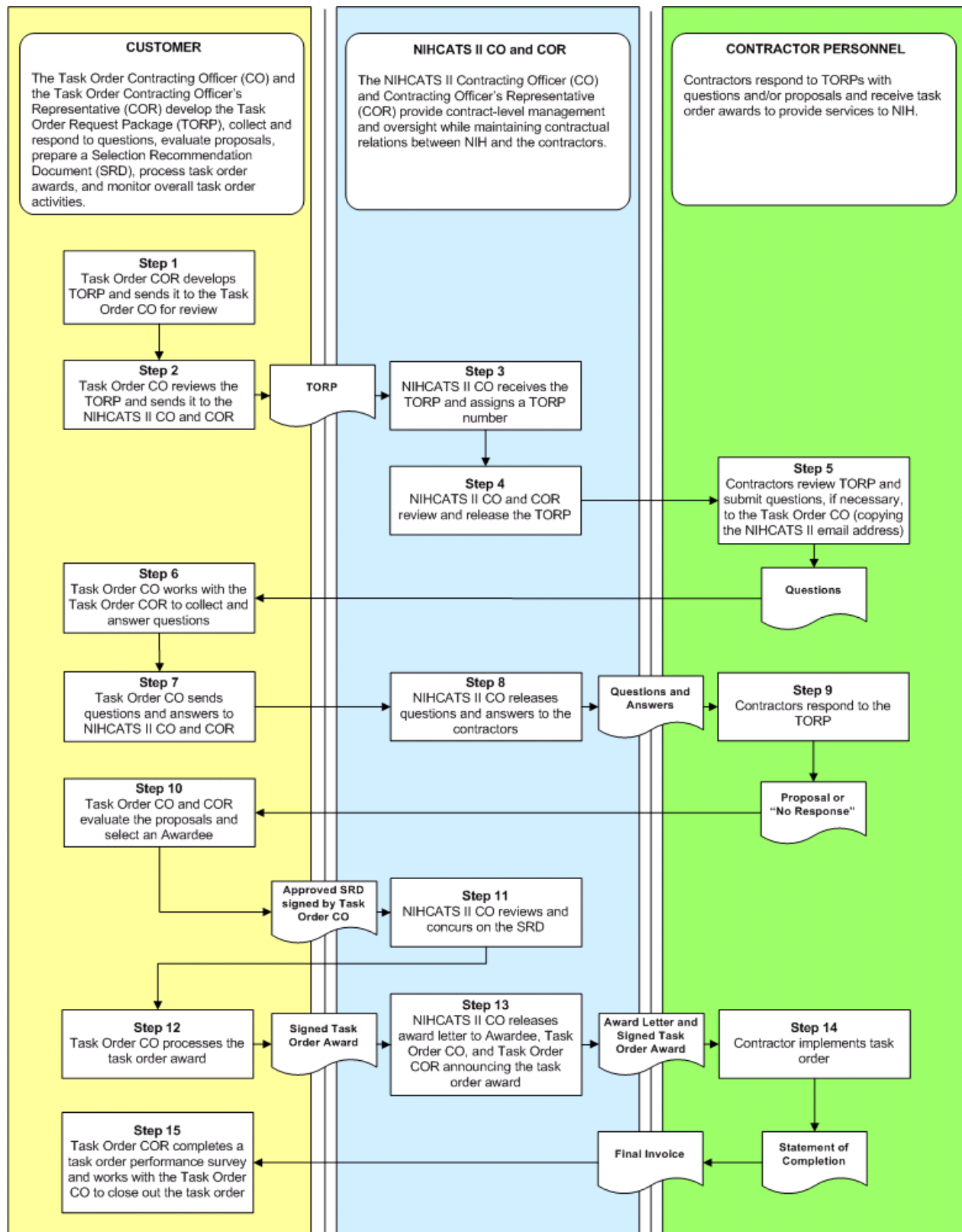
Task Order Guidelines are subject to change; refer to latest version in effect. The latest version will supersede all earlier versions.

Please refer to the NIHCATS II Website at <http://NIHCATSII.olao.od.nih.gov/> and/or contact the NIHCATS II Program Support Team (NIHCATSII@mail.nih.gov) for additional information.

In accordance with Federal Acquisition Streamlining Act (FASA) and Federal Acquisition Regulation (FAR), Part 16.505(b), each contractor will be provided a fair opportunity to be considered for each order in excess of \$3000 unless one of the exceptions stated in FAR 16.505(b)(2) applies.

The required channel for delivery of all correspondence to the NIHCATS II Contracting Officer is electronic via e-mail (NIHCATSII@mail.nih.gov). Microsoft Word is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel.

The figure below charts the Task Order Process Flow from initiation of the requirement through task order close-out, mapping each step to the party primarily responsible for completing the required activities. A more detailed description of the activities occurring at each step is provided in subsequent sections of these guidelines.



3.1 Step 1 - Task Order Contracting Officer's Representative (COR) develops TORP

When a NIH or Federal agency determines a need exists for conference, meeting, or travel services, a Task Order COR will first be identified. The Task Order COR may or may not be the requestor for services, but must be FAC-COR certified. Before creating a Task Order Request Package, the Task Order COR and CO should review the NIHCATS II Contract. The Task Order COR will create a TORP using the TORP form.

The **TORP** will include (1) a Statement of Work (SOW), (2) the estimated period of performance, (3) any applicable Government Furnished Property (GFP), (4) evaluation criteria (criteria may include experience with international issues, corporate experience, past performance, and cost/price), (5) Independent Government Cost Estimate (IGCE) (not released to contractors), (6) funding document, (7) all required clearances (if any), and (8) all required conference/meeting approval request forms and waivers (if applicable) with approvals (<http://NIHCATSII.olao.od.nih.gov/resources.html>).

NOTE: For Task Orders Involving Conferences/Meetings:

For NIH ICs: All required conference/meeting forms and waivers based upon NIH's most recent policy guidance must be approved and submitted with this TORP.

For Federal Agencies (other than NIH): All required conference/meeting forms and waivers based upon the Agency/OPDIV's most recent policy guidance must be approved and submitted with this TORP.

TORP

- Completed TORP Forms
- Statement of Work
- Independent Gov't Cost Estimate
- Funding Document
- Conference/Meeting Approval Request Forms

The TORP will include:

- 1) a Statement of Work (SOW)
- 2) the anticipated period of performance
- 3) any applicable Government Furnished Property (GFP)
- 4) evaluation criteria
- 5) a procurement sensitive Independent Government Cost Estimate (IGCE) (not released to contractors)
- 6) funding document
- 7) all required clearances (if any)
- 8) all required conference/meeting approval request forms and waivers (if applicable)

The Task Order COR will submit the TORP to the Task Order CO for review.

3.2 Step 2 - Task Order CO reviews TORP

Upon review and acceptance, the Task Order CO will send the TORP to the NIHCATS II CO and COR for review using the NIHCATS II Program Support Team e-mail (NIHCATSII@mail.nih.gov).

3.3 Step 3 - NIHCATS II CO receives the TORP and assigns a TORP number

The NIHCATS II CO will assign the TORP an official number prior to review. The TORP number will serve as the task order tracking number. When submitting or sending any documents or e-mails, the Task Order CO shall reference the TORP number (e.g., subject line for e-mails, headers for documents).

3.4 Step 4 - NIHCATS II CO and COR review and release the TORP

The NIHCATS II CO and COR will review the TORP for completion and scope. Any issues with the TORP will be resolved with the Task Order CO and COR. After review and approval, the NIHCATS II CO will release the TORP to all contractors via e-mail and cc: the Task Order COR and Task Order CO. The TORP does not commit NIH to pay any costs incurred in the submission of any proposal, nor does it commit NIH to award a task order for such services. NIH intends for each TORP to be negotiated into a resulting task order; however, there is no guarantee that a task order will be issued in every case.

3.5 Step 5 - Contractors review TORP and submit questions if necessary

Upon receipt of the TORP, all contractors will have the opportunity to review the requirement and submit questions requiring clarification. Contractors shall submit all questions to the Task Order CO via e-mail (CC'ing the NIHCATS II email address (NIHCATSII@mail.nih.gov)) by the date indicated in the TORP.

3.6 Step 6 - Task Order CO works with the Task Order COR to prepare responses to questions

The Task Order CO will work with the Task Order COR to sufficiently respond to any questions submitted by the contractors. Technical related questions will be answered by the Task Order COR; contractual questions will be answered by the Task Order CO.

3.7 Step 7 - Task Order CO sends questions and answers to the NIHCATS II CO and COR

All questions and answers will be compiled by the Task Order CO and sent to the NIHCATS II CO and COR via the NIHCATS II e-mail address (NIHCATSII@mail.nih.gov).

3.8 Step 8 - NIHCATS II CO releases questions and answers to the contractors

Questions and answers will be released simultaneously to all contractors by the NIHCATS II CO.

3.9 Step 9 - Contractors respond to the TORP

Each contractor will have the opportunity to review the requirement, any provided questions and answers, and determine whether or not to submit a proposal. The contractors shall submit a response via either a written proposal or a "No Response" statement in response to the TORP.

3.9.1 Proposals

Proposals shall be submitted electronically via e-mail to the Task Order CO, copying (cc:) the NIHCATS II e-mail address (NIHCATSII@mail.nih.gov). Oral proposals will not be accepted. Proposals will consist of two parts: a technical proposal and a business proposal. The contractors shall prepare a proposal with as much detail as requested by the TORP. Please note that these proposals may be quite brief unless additional information is required. If price is the only evaluation factor listed, award will be made to the lowest price.

The NIHCATS II contracts have been reserved as a Partial Small Business set-aside. Task order proposals for domestic services with an estimated value of \$500,000 and below will receive priority consideration for award to a small business. (If the Task Order CO receives two or more task order proposals for domestic services valued at \$500,000 or less, the Task Order CO would first review offers submitted from small business concerns. If the Task Order CO receives no acceptable offers from small business concerns, the set-aside shall be withdrawn and offers from the large business will then be considered). Furthermore, the Government may solicit task order proposals with an estimated value above \$500,000 from small businesses. The small business reservation does not preclude large business from submitting proposals on any task order, reference (FAR 19.502-3).

Vendor
Proposal

- Technical Proposal
- Price Proposal

Proposals must be submitted electronically via email; oral proposals will not be accepted.

Proposals will consist of two parts: a technical proposal and business proposal

Technical Proposals shall sufficiently respond to all elements of the TORP.

Business Proposals shall include an estimated ceiling (not to exceed) amount specifying labor and other related fees and expenses. Contractors shall propose a specific handling charge percentage for that task order. The hourly rates for the proposed task order labor categories may not exceed, but may be less than, the rates stated in the associated NIHCATS II contract. All proposed rates are subject to review by the NIHCATS II CO for compliance with the associated NIHCATS II contract.

The contractor's will ensure that all proprietary information is appropriately marked within the proposals.



**Note for
non-NIH
customers**

For all task orders issued for agencies other than NIH, contractors shall include a 1% fee as part of their business proposal. This administrative fee will be charged by the contractor and then credited to a designated NIH/OLAO Cost Accounting Number (CAN).

3.9.2 "No Response" Statements

A "No Response" statement shall be submitted if a contractor is unable or otherwise cannot perform a requirement. This shall be submitted electronically via e-mail to the Task Order CO copying the NIHCATS II e-mail address.

All **"No Response" statements** shall include a brief statement as to why the contractor has elected to forego the opportunity.

**No Response
Statement**

A "No Response" statements shall be submitted if a contractor is unable or otherwise cannot perform a requirement.

All "No Response" statements shall include a brief statement as to why the contractor has elected to forego the opportunity.

3.10 Step 10 - Task Order CO and Task Order COR evaluate the proposals and select an Awardee

The Task Order CO and Task Order COR will evaluate the contractors' technical and business proposals. It is the responsibility of the Task Order CO and Task Order COR to ensure that contractors are treated equitably and fairly during this evaluation process.

The Task Order CO and Task Order COR are responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure.

After completion of the evaluation, negotiations are conducted, and any revised proposals evaluated. After selection of the Awardee, the Task Order COR will complete a Selection Recommendation

Document (SRD) describing the review process and detailing the reason that award to the recommended contractor is in the best interest of the Federal government in accordance with FAR 16.505(b). An SRD template may be found on the Resources page of the NIHCATS II Website (<http://NIHCATSII.olao.od.nih.gov>).

The SRD must include (1) the selection criteria/methodology for evaluating submitted proposals as originally defined in the TORP package, (2) a list of the contractors that responded to the TORP, (3) rationale for the recommendation of the task order Awardee, including a summary of evaluation results, any negotiations conducted, price analysis, and award analysis (rationale for the recommendation of the Awardee), and (4) signature of the Task Order CO.

The Task Order CO will forward the SRD to the NIHCATS II CO (via the NIHCATS II e-mail NIHCATSII@mail.nih.gov) for review and concurrence.

**Selection
Recommendation
Document
(SRD)**

The Selection Recommendation Document (SRD) will include:

- 1) the selection criteria for evaluating submitted proposals as originally defined in the TORP package
- 2) list of contractors that responded to the TORP
- 3) evaluation results and rationale for the recommendation of the Awardee
- 4) Task Order Contracting Officer signature

3.11 Step 11 - NIHCATS II CO reviews and concurs on the SRD

After reviewing and concurring with the SRD, the NIHCATS II CO will notify the Task Order CO via e-mail to begin processing the task order award.

3.12 Step 12 - Task Order CO processes the task order award

Per NIH acquisition rules, no task order released under this vehicle can be awarded as a standalone contract or purchase order.

The **task order** will contain:

- contract number (for the NIHCATS II contractor selected),
- task order number,
- order date,
- point of contact for billing purposes,
- statement of work (SOW),

- appropriation/funding citation,
- amount of funds obligated,
- billing and delivery addresses, and
- period of performance.

Task Order

The Task Order will contain:

- (1) contract number (for the NIHCATS II contractor selected)
- (2) task order number
- (3) order date
- (4) billing point of contact
- (5) statement of work (SOW)
- (6) appropriation/funding citation
- (7) amount of funds obligated
- (8) billing and delivery addresses
- (9) period of performance

NIH customers will work in conjunction with their respective COAC to process an OF-347 Purchase Order Form. A copy of the signed OF-347 must be provided to the NIHCATS II CO the same day the award is signed by the Government. Federal agencies outside of NIH will work with their procurement office to process an approved award document form used by that agency. A copy of the signed award document must be provided to the NIHCATS II CO the same day that the award is signed by the Government.

The Task Order CO and Task Order COR should establish and maintain a task order file containing, at a minimum, all pre-award documentation/proposals/approvals, awarded task order, task order administration documents and correspondence, modifications and supporting documentation, invoices, performance evaluations, closeout documents, and any other documents/correspondence relative to each individual task order.

3.13 Step 13 - NIHCATS II CO releases the award letter

The NIHCATS II CO will release the signed task order award document along with an award letter to the Awardee and Task Order CO and Task Order COR announcing the task order award.

3.14 Step 14 - Contractor implements the task order

The contractor is authorized to start work on the period of performance start date indicated in the task order award document.

The contractor will submit all task order invoices to the billing address indicated in Article G.4 (Method of Ordering) of their NIHCATS II contract. All invoices shall include both current and cumulative billing

and clearly cite the funds remaining. The Task Order COR is responsible for reviewing/approving these invoices and ensuring that appropriate receiving is entered.

3.15 Step 15 - Task order close-out

After the Task Order has expired, the contractor must submit a Task Order Close-Out form to the Task Order COR who will, in conjunction with the Task Order CO, assess the quality of services received by completing a performance survey (available on the NIHCATS II Website at <http://NIHCATSII.olao.od.nih.gov>), and ensure that all task order requirements were met. The Task Order CO will send the performance survey and a copy of the final Close-Out form to the NIHCATS II CO via e-mail.

The contractor shall also submit the final invoice to the Task Order COR including a statement indicating that all costs have been accounted for and billed. The contractor shall forward a copy of the final invoice to the NIHCATS II CO when the task order has been completed.

3.16 Task Order Award Timelines

Task order award timelines are largely dependent on the specific requirement. The timeline for the NIHCATS II Program Support Team to review and release the TORP to contractors (Task Order Steps 3-4 from above) is targeted to be approximately five (5) business days. Task orders with special requirements or complex requirements may take longer. This processing time begins once a complete, acceptable TORP is received by the NIHCATS II Contracting Officer. Incomplete or unacceptable TORPs will require additional time for the NIHCATS II Contracting Officer to advise the Task Order CO on minimum acceptable requirements.

Task Order COR in consultation with the Task Order CO will establish a TORP response time that will afford contractors a reasonable opportunity to respond to the requirement. When establishing the TORP response time, Task Order COR and Task Order CO shall consider the circumstances of the individual acquisition and account for factors such as the complexity, availability, and value of the requirement.

4 CONTRACT AND TASK ORDER MANAGEMENT

As outlined in Section 2 of this document, the Office of Logistics and Acquisition Operations (OLAO) will provide contract-level management and oversight for the NIHCATS II contracts through the NIHCATS II Program Support Team. The Task Order Contracting Officer (CO) and Task Order Contracting Officer's Representative (COR) will perform day-to-day management and oversight for each task order.

4.1 Contract Management

The NIHCATS II Contracting Officer (CO) will perform contract administration duties while the NIHCATS II Contracting Officer's Representative (COR) will track and guide contract performance over the life of the contract. The NIHCATS II Program Support Team employs several methods and tools to assist this effort, in close concert with performance monitoring and evaluation efforts. These tools include the following.

4.1.1 Contract Files

The NIHCATS II Program Support Team maintains a central file for each of the contracts. The file contains the contract and all documentation; all contract modifications, correspondence, and performance evaluation reports, as well as copies of task orders, task order documentation, and task order modifications.

4.1.2 Training

The NIHCATS II Program Support Team will prepare and conduct training presentations to assist NIHCATS II customers and contractors in understanding and using the NIHCATS II contracts. Training sessions will also be held with the contractors to improve their understanding of the task order process. Training all parties involved will facilitate adherence to the task order procedures. In addition, materials such as this SOP document, FAQs, templates, and other supporting documents are available on the NIHCATS II Program Support Team's website at <http://NIHCATSII.olao.od.nih.gov/>. To request training for your office or IC, contact the NIHCATS II Program Support Team at (NIHCATSII@mail.nih.gov).

4.2 Task Order Management

The Task Order CO and Task Order COR will be responsible for the task order activities involving initiating, awarding, administering, and closing out task orders. They will track and guide task order performance over the life of the task order. The NIHCATS II Program Support Team will assist all customers in their task order activities as well as log and maintain records of all task orders.

4.2.1 Initiation and Close-out of Task Orders

Task order initiation and close-out activities will be the responsibility of the Task Order CO and Task Order COR. These materials may be reviewed by the NIHCATS II COR.

4.2.2 Day-to-Day Oversight and Management

The Task Order CO and Task Order COR provide "frontline" day-to-day monitoring of the task order during the task order period of performance. Since this is a non-personal services contract, the Task Order CO and Task Order COR shall ensure that direct management of contractor personnel remains the responsibility of the contractor's management staff.

The Task Order CO and Task Order COR are responsible for monitoring and assessing the contractor's task order performance, including the responsiveness of the contractor management staff.

Contract level issues that arise during task order performance should be referred to the NIHCATS II Program Support Team for resolution (e.g., need for contract modifications, contract disputes, contract terminations).

4.2.3 Acceptance of Services

The Task Order CO and Task Order COR are responsible for inspection and acceptance of task order services provided. If services are rejected, this must be documented in writing to the contractor, with recitation of the requirement and factual statements of how the contractor failed to meet these requirements.

4.3 Task Order Modifications

Task order modifications are generally made to correct oversights or changes in conditions from the original task order. The following procedures will apply to task order modifications:

4.3.1 No-Cost Modifications

After obtaining approval by the NIHCATS II CO, no-cost modifications will be processed directly by the Task Order CO with input from the Task Order COR.

Copies of any task order modification executed must be sent to the NIHCATS II CO and COR via the NIHCATS II Program Support Team e-mail (NIHCATSII@mail.nih.gov).

4.3.2 Addition of Funds

After obtaining approval by the NIHCATS II CO, modifications to add funds to a task order will be processed directly by the Task Order CO with funding documentation provided by the Task Order COR.

Copies of any task order modification executed must be sent to the NIHCATS II CO and COR via the NIHCATS II Program Support Team e-mail (NIHCATSII@mail.nih.gov).

4.3.3 Additional Work / Additional Time

If the customer's modification requirement alters the scope, adds an additional period of performance, or provides for major changes such as additional work, a task order modification is not appropriate. Instead, a new TORP must be initiated.